

PEOPLES BANK & TRUST COMPANY

Job Description

Job Title: Assistant Head Personal Banker

Department: Personal Banker / Operations

Reports To: Head Personal Banker

Status: Exempt / Non-Exempt

Date: July 2025

To apply for this position, please complete a PBT application:

www.pbtc.net

Position Summary

The Assistant Head Personal Banker supports the Head Personal Banker in overseeing daily branch operations and ensuring compliance with bank policies and procedures, particularly those related to BSA (Bank Secrecy Act). This role requires advanced knowledge of banking operations, strong leadership, and the ability to resolve complex customer issues. The Assistant Head Personal Banker also serves as a mentor and resource for Personal Bankers and may act as the Head Personal Banker in their absence.

Key Responsibilities

- Maintain thorough knowledge of banking laws, regulations, and PBT policies, with emphasis on BSA compliance.
- Serve as acting Head Personal Banker when needed.
- Perform all standard Personal Banker duties with proficiency.
- Provide guidance and support to Personal Bankers; assist with training and development.
- Help manage daily operations, including scheduling, task delegation, and workflow monitoring to ensure timely and high-quality customer service.
- Support performance monitoring and assist with disciplinary actions in coordination with the Head Personal Banker and/or Branch Manager.

- Collaborate with other branches and supervisors to resolve inter-branch issues.
 - Assist in onboarding and continuous training of Personal Bankers.
 - Investigate and resolve cash discrepancies.
 - Assist with currency ordering and processing of cash shipments to/from the Federal Reserve and other PBT locations.
 - Prepare and assist with management reports, including:
 - Annual performance reviews
 - Cash balancing (teller, coin, vault)
 - Vault maintenance and physical balancing (twice weekly)
 - Large cash transactions
 - Review of CTRs, SARs, and account holds
 - Participate in Head Personal Banker meetings as needed.
 - Perform additional duties as assigned by the supervisor.
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Qualifications

Education & Experience:

- High school diploma or equivalent required.
- Minimum of two years of experience as a Personal Banker with a strong performance record preferred.

Skills & Competencies:

- Strong knowledge of banking procedures and regulatory compliance (especially BSA).
 - Excellent communication, customer service, and leadership skills.
 - Ability to manage multiple priorities in a fast-paced environment.
 - Proficiency in Microsoft Excel, Word, Core Director, and teller systems.
 - Ability to work independently and collaboratively as part of a team.
 - Adaptability and willingness to embrace change.
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Physical Requirements

- Ability to stand for extended periods.
 - Must be able to lift heavy coin bags, currency bundles, and other materials.
 - Manual dexterity required for handling cash and operating office equipment.
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Peoples Bank & Trust Co. is an Equal Opportunity Employer.

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, or protected veteran status and will not be discriminated against on the basis of disability.